

# VOICE OF INDIA'S CONCRETE INDUSTRY

*World of Concrete (WOC) 2026  
CEO-CTO Conclave*

Industry intelligence report

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Confidential and proprietary

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# Concrete India 2026: Standing at the inflection point

India’s concrete, cement and construction industry stands at a defining crossroads. The WOC 2026 CEO–CTO Conclave, drawing 25 senior CEOs and technology leaders for two structured 90-minute sessions, produced the clearest, most candid articulation of the industry’s position that any single forum has generated in recent years.

This report is the industry’s collective voice, synthesized from live conversations rather than surveys or questionnaires. Its findings are addressed to the Government of India, its ministries, regulatory bodies, and industry chambers.



**INR 58.8T**

India’s construction  
market GVA by 2035



**INR 53.5T**

Union budget  
FY2026–27



**INR 607B**

India precast concrete  
market



**INR 3.7T**

India RMC market by  
FY30



**70%**

Digital twin adoption in  
India



**INR 34T**

CAPEX to decarbonize  
cement

## What the conclave told us

The CEO Conclave addressed four strategic topics: the carbon transition and its regulatory mechanics; precast and modern methods of construction; the labor and skilling crisis; capital markets and green financing. The CTO Conclave, themed “Reimagining Concrete

2.0-When the Site Becomes a System,” examined AI on site, digital twins, robotics and automation, 3D concrete printing, circular economy technology, and the materials innovation pipeline.

What emerged from both rooms was not a set of aspirations-it was a set of tensions. Between ambition and execution. Between innovation and standardization. Between the speed required by India’s growth and the depth required by its sustainability commitments. Between what technology can do today and what the industry’s data infrastructure and regulatory environment allow it to do at scale.



# Seven themes that demand urgent action

Across both conclaves, seven cross-cutting themes surfaced independently and repeatedly. They are not incremental observations—they are structural findings about where the industry is stuck and what it needs to move:

01

## **Procurement reform is the master key:**

India's L1 (lowest cost) procurement model suppresses quality, innovation and sustainability across every topic discussed. Shifting to performance-based and L1-carbon evaluation is the single highest-leverage policy intervention available.

02

## **Labor shortage is existential, not cyclical:**

The effective skilled labor deficit far exceeds headline estimates. Productivity, not headcount, is the right metric. Mechanization and industrialized construction are the fastest bridges.

03

## **The AI trust gap is blocking production deployment:**

AI pilots abound; production deployments are rare. Data quality, governance, traceability and legal liability frameworks are the missing preconditions.

04

## **Standardization is innovation's most reliable bottleneck:**

From UHPC to self-healing concrete, 3D printing to recycled aggregates—the research exists, prototypes exist, markets exist. BIS standards and CPWD specification inclusion do not.

05

## **Execution, not regulation, is the circular economy gap:**

India has only ~20 C&D waste recycling plants despite regulatory mandates. The gap between code and practice is widening, not narrowing.

06

## **The future is hybrid—not binary:**

Precast and 3D printing. AI and human judgment. Automation and skilled trades. The most sophisticated voices consistently rejected either/or thinking.

07

## **The triple financing challenge is unprecedented:**

Decarbonization capital, technology adoption capital and innovation capital are all required simultaneously—at a scale Indian firms cannot access without credible ESG data infrastructure.

## What industry is asking of government

The conclave closed with a unified set of policy asks—expanded in this report to twelve specific recommendations across five pillars: Carbon & Green Finance; Procurement & Standards; Skilling & Workforce; Technology Enablement; and Circular Economy. These are not wish lists. They are the minimum enabling conditions for India's concrete industry to deliver on the infrastructure, sustainability and housing commitments the nation has made.

## Core message to government

India's concrete industry is not asking for protection or subsidy. It is asking for clarity, speed and alignment. Clarity on carbon frameworks. Speed on standards development. Alignment between procurement rules and sustainability goals. The industry stands ready to invest, innovate and build—at the scale India requires. The question is whether policy can keep pace.





## **Section 1**

India's concrete moment:  
The macro context

India is executing the most ambitious construction program in its history-and possibly one of the most ambitious in the world. With India’s construction sector GVA projected to reach INR 58.8T by 2035 and an infrastructure pipeline exceeding INR 185T under the National Infrastructure Pipeline, and residential construction alone approaching INR 36T by 2030, the concrete industry sits at the center of India’s economic future.

Yet the industry faces a paradox: it is simultaneously the backbone of national development and one of its most significant sources of embodied carbon. It is growing rapidly yet struggling to attract and retain

skilled labor. It is innovating at a remarkable pace yet struggling to move innovation from laboratory to laborer. It has access to transformative technologies yet lacks the data infrastructure, regulatory frameworks and financing mechanisms to deploy them at scale.

The WOC 2026 CEO–CTO Conclave was convened precisely at this moment of paradox. Its findings, captured in this report, represent the most authoritative collective voice the industry has produced on how to resolve these tensions-and what it needs from government and policy to do so.

|  Scale of opportunity |
|--------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>India’s construction market GVA: INR 58.8T by 2035</li></ul>     |
| <ul style="list-style-type: none"><li>Residential construction: INR 36T by 2030</li></ul>              |
| <ul style="list-style-type: none"><li>NIP infrastructure pipeline: INR 185T</li></ul>                  |
| <ul style="list-style-type: none"><li>Ready-mix concrete market: INR 3.7T (2030)</li></ul>             |
| <ul style="list-style-type: none"><li>Precast concrete market: INR 607B and growing</li></ul>          |
| <ul style="list-style-type: none"><li>Construction chemicals market: INR 441B, 13% CAGR</li></ul>      |

|  Scale of challenge |
|-------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>INR 34T CAPEX needed to decarbonize cement</li></ul>            |
| <ul style="list-style-type: none"><li>75M+ construction workers needed by 2030</li></ul>              |
| <ul style="list-style-type: none"><li>Only 3% of cement energy from renewables</li></ul>              |
| <ul style="list-style-type: none"><li>Only ~20 operational C&amp;D waste recycling plants</li></ul>   |
| <ul style="list-style-type: none"><li>150M tonnes C&amp;D waste generated annually</li></ul>          |
| <ul style="list-style-type: none"><li>India loses ~4% of GDP to corrosion annually</li></ul>          |



## Section 2

# Seven strategic themes

The following themes did not emerge from any single session or any single topic. They surfaced independently across the CEO Conclave and the CTO Conclave, across different industries and roles, and across business strategy and technology conversations. Their cross-session coherence is precisely what makes them credible as industry-level findings rather than individual opinions.

## Procurement reform: The master key

No single issue surfaced more consistently across the two conclaves than India's L1 (lowest upfront cost) procurement model. Leaders from both rooms, across every topic, identified L1 procurement as the systemic barrier that suppresses quality, discourages innovation, slows sustainability adoption and makes it economically irrational to specify better materials or methods.



### Opinions & ideas from leaders



*"The procurement framework itself must evolve. Instead of evaluating projects purely on L1 cost criteria, we should move towards an L1 carbon emission model, where materials and solutions are assessed based on their carbon footprint alongside their commercial viability."*

*"The private sector continues to rely heavily on L1 procurement models focused primarily on upfront cost. This often limits the adoption of innovative construction systems, even when they offer superior lifecycle value."*

*"The future of procurement should be based on performance standards rather than prescriptive specifications. When outcomes are clearly defined, industry can innovate and deploy the most effective technologies available."*



The frustration was not with the concept of competitive procurement but with its narrow interpretation. Leaders noted that quality-based selection mechanisms already exist within government frameworks but are underutilized because the processes are lengthy and unfamiliar. The ask is not to eliminate competition—it is to compete on value, not merely on price.

### Key propositions from leaders

- Introduce L1-carbon evaluation alongside L1-cost for government infrastructure contracts above a defined threshold.
- Mandate green cement and low-carbon concrete specifications in public procurement beginning with large-scale central government projects.
- Activate quality-based selection mechanisms already embedded in CPWD and MoRTH frameworks with streamlined procedures.
- Adopt performance-based procurement (outcome specifications) that allow industry to deploy the most effective technology for a given outcome rather than prescribing specific materials or methods.
- Link precast and MMC adoption to mandatory specification thresholds in contracts above a defined value as Singapore has done with industrialized construction.

### Singapore benchmark

Singapore's Building and Construction Authority accelerated industrialized construction by linking incentives and land allocation directly to the adoption of advanced construction technologies. India has the policy apparatus and the demand scale to replicate this approach at far greater impact.

## Labor as an existential crisis

The skilled labor shortage was described in both conclaves as the industry's "biggest construction bottleneck" and "least-discussed existential risk." The gap is structural and deepening: India needs 75+M construction workers by 2030, but current training infrastructure, wage levels and career pathways are not remotely adequate to meet this need.



### Opinions & ideas from leaders



*"The industry's labor shortage is often underestimated. While headcount shortages may appear to be around 20-30%, the effective shortage is significantly higher because a large proportion of available workers lack the skills required for specialized construction activities."*

*"The challenge is not labor availability alone. For the same volume of work, India often requires significantly more workers than competing markets because productivity levels remain lower than global benchmarks."*

*"Nearly 439,000 new construction workers are needed annually globally just to meet demand-India's share of that gap is enormous."*



The CTO Conclave framed this challenge in technology terms: Construction 4.0 requires not just more workers, but a fundamentally different type of worker - BIM coordinators, data technicians, digitally skilled equipment operators and VDC professionals. India's most under-supplied construction resource is skilled labor.

### Key propositions from leaders

- Establish a National Construction Skilling Mission with industry co-funding, linking accreditation reform to practical, site-relevant competencies.
- Build state-level skilling ecosystems rather than national one-size-fits-all models. Different states have different labor pools, construction practices and industry needs.
- Replace headcount targets with productivity benchmarks as the measure of skilling program success.
- Introduce outcome-based incentives for workers in industrialized construction, linking compensation to measurable production outputs.
- Drive AI-powered training platforms and VR/AR site simulations as force-multipliers for skilling at speed.
- Incentivize construction careers through improved wage frameworks, structured career pathways and professional development recognition.



## The AI trust gap: Black boxes do not build bridges

Artificial Intelligence was present in virtually every CTO Conclave conversation-and the consensus on where it stands was nuanced. Real deployments exist: predictive maintenance at cement plants, process optimization for clinker synthesis, bid estimation, schedule optimization, site QC and drone-based monitoring. But the gap between pilot and production is wide, and the primary barriers are not technical.



### Opinions & ideas from leaders



*“Large Language Models are still not trusted completely by end users because they operate as a black box. Users often do not know how a particular output was generated or what inputs influenced the decision, which creates hesitation around adopting AI for critical workflows.”*

*“The real value of AI lies in the pre-deployment stage approach, where organizations can leverage AI for scale, speed and accelerated decision-making. By reducing manual effort across design, simulation and planning workflows, AI has the potential to dramatically improve execution efficiency.”*

*“AI still needs human expertise. It can process information, identify patterns and accelerate decision-making, but it cannot replace human judgment, engineering intuition and common sense.”*



The most significant unresolved issue-highlighted explicitly by multiple leaders-is legal liability. India has no framework governing IP ownership or legal accountability for AI-generated construction designs. With an estimated INR 34T of construction investment required for decarbonization alone, the absence of such frameworks represents a board-level exposure that is not yet being discussed at the board level.

### Key propositions from leaders

- Require traceability and explainability as minimum standards for AI tools used in safety-critical construction applications.
- Establish India-specific legal frameworks for IP ownership and liability for AI-generated engineering designs.
- Invest in data governance infrastructure as a national priority. Poor data quality is a primary reason AI fails to deliver ROI, even before scaling is attempted.
- Support mid-sized firms in accessing AI capabilities through industry-wide LLM platforms trained on construction-specific use cases.
- Recognize AI agents as autonomous workflow coordinators, not just analytics dashboards, and regulate accordingly.

### Unresolved risk: AI legal liability

Legal liability and IP ownership of AI-generated designs remain entirely unresolved in India. This is not an abstract future risk-it is an active exposure on projects already deploying AI tools for design, schedule and bid estimation. India needs an AI-in-Construction governance framework as urgently as it needs an AI adoption strategy.

## Standardization: Innovation's most reliable bottleneck

Across precast, 3D printing, UHPC, self-healing concrete, PCM concrete, recycled aggregates and green admixtures-the same observation surfaced with striking consistency: the research exists, the commercial prototypes exist, the demand exists. What

does not exist are BIS standards, CPWD specification inclusion, MoRTH coverage and financial incentives to specify these materials on government contracts.



### Opinions & ideas from leaders



*"Almost every material discussed above has a research base and commercial prototypes. What India uniformly lacks is BIS standards, CPWD/MoRTH specification inclusion, and financial incentives to specify newer materials on government contracts."*

*"The challenge is not the absence of standards but the disconnect between what is permitted in codes and what is available in practice. While existing codes provide guidance for the use of recycled concrete aggregates, the same level of clarity does not exist for mixed recycled aggregates, creating uncertainty across the value chain."*



The standardization gap has a compounding effect: without specifications, innovative materials cannot be specified on government projects; without government projects, there is no demand at scale; without scale, costs remain high; without cost

competitiveness, private projects do not adopt them either. Breaking this cycle requires proactive specification development-not reactive standard-setting after commercial adoption has already occurred elsewhere.

## Material innovation pipeline vs Standardization status

| Material/Technology             | Commercial readiness           | BIS/CPWD status              | Priority ask                            |
|---------------------------------|--------------------------------|------------------------------|-----------------------------------------|
| LC3 / GGBS blended cement       | Ready, limited structural use  | No structural grade standard | <b>Fast-track IS standard</b>           |
| Ultra-high-performance concrete | Research + prototypes          | Not in CPWD schedule         | <b>Pilot project specification</b>      |
| Self-healing concrete           | Lab to early commercial        | No BIS standard              | <b>CSIR-SERC collaboration pathway</b>  |
| 3D concrete printing            | 3 commercial factories (India) | No mix design standard       | <b>IS standard for printed concrete</b> |
| PCM-embedded concrete           | Commercial globally            | No Indian specification      | <b>CPWD pilot inclusion</b>             |
| Recycled aggregate concrete     | Mixed aggregates available     | IS 383 covers, not fully     | <b>Segregation mandate + standard</b>   |
| Green admixtures / low-VOC      | Commercially available         | Partial regulatory coverage  | <b>Procurement preference</b>           |

## Execution over regulation: The circular economy

India's circular economy agenda in construction is well-intentioned and increasingly well-regulated-but chronically under-executed. IS 383 permits recycled aggregate concrete. The Carbon Credit Trading Scheme covers cement. The Supreme Court has directed states on C&D waste recycling. Yet only around 20 operational recycling plants exist nationwide, 150M tonnes of C&D waste are generated annually and largely unprocessed, and recycled aggregate concrete remains absent from mainstream RMC supply chains.



### Opinions & ideas from leaders



*"The gap is no longer in regulation but in execution."*

*"India possesses enormous reserves of industrial by-products, including an estimated 19B tonnes of LD slag. The opportunity now lies in transforming these legacy waste streams into commercially viable construction materials."*

*"The Supreme Court has questioned states on the slow adoption of recycling infrastructure, yet India still has only around 20 operational recycling plants. Despite the provisions available under IS 383, recycled aggregate concrete remains largely absent from mainstream ready-mix supply chains."*



The CTO Conclave pointed to a specific technical barrier: C&D waste facilities produce mixed recycled materials because concrete and non-concrete waste streams are not segregated at source.

### Key propositions from leaders

- Mandate source-segregation of C&D waste at demolition sites above a defined project scale.
- Scale C&D recycling infrastructure to a minimum of 200 plants nationally-from the current ~20.
- Introduce AI-enabled material tracking systems in RMC plants to enable real-time yield optimization and circular material flow.
- Require IoT-enabled material passports for supplementary cementitious materials (fly ash, GGBS, C&D waste) to enable circular economy verification.
- Establish a defined minimum percentage of C&D waste utilization within RMC plant operations through procurement mandates.
- Unlock India's 19B tonnes of LD slag through commercial development pathways and procurement incentives.

## The hybrid future: Rejecting binary thinking

Among the most intellectually significant outcomes of the conclave was the consistent, unprompted rejection of binary choices by the most experienced voices in both rooms. The industry is not choosing between precast and 3D printing. Between AI and human engineering. Between automation and skilled labor. Between innovation and proven methods. The future they described is hybrid by design.



### Opinions & ideas from leaders



*“The future is unlikely to be 100% precast or 100% 3D printed. Instead, the industry will benefit from hybrid construction models that combine the strengths of both approaches.”*

*“The objective of robotics is not to replace people but to eliminate repetitive and mundane work-allowing people to focus on higher-value activities while machines handle routine tasks.”*



This hybrid thinking has direct policy implications. Regulations, standards and procurement frameworks that mandate single-technology approaches-or that implicitly disadvantage hybrid methods by requiring technology-specific certifications-will impede the industry’s natural evolution toward optimized, context-specific combinations of approaches. Technology-agnostic, performance-based frameworks are the correct regulatory posture.

### Key propositions from leaders

- Adopt technology-agnostic, performance-based procurement frameworks across CPWD and MoRTH that specify outcomes, not technologies, so that hybrid methods are not structurally disadvantaged relative to prescriptive single-technology approaches.
- Establish certification and liability pathways for hybrid construction methods: precast combined with 3DCP, or AI-assisted workflows with engineering oversight, without requiring separate technology-specific regulatory approvals for each component.
- Fund dedicated hybrid demonstration projects at national scale: 3DCP for complex geometries paired with precast for structural elements; AI scheduling tools embedded in engineering workflows with clearly defined human override protocols.
- Develop human-robot collaboration (cobot) standards for construction sites covering safety, liability, and oversight requirements, enabling cobots to manage repetitive and hazardous tasks while humans retain critical judgment roles.
- Position technology-neutrality as the guiding principle across all new BIS standards and CPWD schedules: specify the performance outcome required; let industry determine the optimal technology pathway to deliver it.

## The triple financing challenge

The financing conversation in the CEO Conclave revealed a challenge of unprecedented complexity. India's concrete and cement industry must simultaneously mobilize three categories of capital: investment in decarbonization (plant upgrades, alternative fuels, clinker substitution); investment in deploying decarbonization solutions (technology scale-up); and investment in innovation (next-generation materials, construction methods, digital infrastructure). These three requirements are not sequential, they are concurrent.



### Opinions & ideas from leaders



*"The industry's financing challenge is no longer limited to building capacity. Capital must simultaneously support decarbonization, technology adoption, innovation and large-scale infrastructure delivery, making access to diverse funding sources increasingly important."*

*"The next phase of growth will require Indian companies to tap international pools of capital. Global investors are increasingly looking for credible sustainability-linked investment opportunities."*



The central bottleneck is ESG data infrastructure. Sustainability-linked loans and bonds are available globally and accessible to Indian firms, but only if they can demonstrate credible, verified sustainability performance through internationally recognized reporting frameworks. Most Indian concrete companies cannot currently do this. Addressing this gap is therefore both a financing imperative and a technology deployment requirement (the ESG data stack must be built as a precondition for green finance access).

### Key propositions from leaders

- Establish a national framework for embodied carbon measurement in construction materials-credible, standardized and internationally aligned.
- Support Indian concrete and cement firms in developing ESG reporting infrastructure through industry bodies and government-backed platforms.
- Develop green financing instruments specifically suited to mid-sized Indian concrete companies-domestic SLL/SLB structures with accessible entry points.
- Accelerate REIT framework development for industrial and construction-sector real estate to unlock patient capital.
- Evolve PPP models under the National Infrastructure Pipeline to include sustainability performance requirements and green financing linkages.



## Section 3

# The CEO Voice: Business strategy & structural challenges

The CEO Conclave addressed four topics that span the strategic landscape of India's concrete industry in 2026. What follows is an organized account of the opinions, ideas and solutions that emerged from each discussion.

## 3.1 Carbon reckoning: The industry's defining challenge

### Collective diagnosis

CEOs were unambiguous: decarbonization is no longer a future obligation—it is a present competitive reality. India's GHG Emission Intensity Target Rules now mandate targets for 186 cement facilities. The EU Carbon Border Adjustment Mechanism (CBAM) has been operational since January 2026. The Carbon Credit Trading Scheme now covers cement. The regulatory architecture is in place. The industry's challenge is execution, not awareness.

A notable point of convergence: leaders urged against waiting for advanced solutions while proven ones go unused. Fly ash-blended cements, GGBS and other supplementary cementitious materials are commercially available today and underutilized. The industry called for an immediate adoption drive for proven low-carbon materials, running in parallel with longer-term innovation in LC3, UHPC and other next-generation alternatives.



### Opinions & ideas from leaders



*"Cement is not the final product. Cement becomes concrete, and concrete becomes buildings, infrastructure and cities. Carbon reduction efforts cannot stop at the manufacturing stage; they must be measured and managed at the level of the finished asset."*

*"A large proportion of cement-sector emissions originate from the calcination process rather than energy consumption alone. Decarbonization therefore requires a fundamental shift in material composition, clinker substitution and alternative cementitious solutions, not just cleaner energy sources."*

*"The foundation of sustainable development is the principle of People, Planet and Profit. As decarbonization frameworks mature globally, India must move towards quantified carbon limits, transparent measurement systems and material-level carbon accounting to drive meaningful change."*



### Solutions proposed

- Material-level carbon accounting across the entire asset lifecycle—not just at the plant gate.
- GST relaxations and tax incentives for low-carbon construction materials.
- Embodied carbon requirements in building codes and infrastructure specifications.
- Carbon accounting and sustainability principles included in mainstream engineering education.
- Showcase and visibility programs for successful low-carbon projects to accelerate ecosystem adoption.

## 3.2 Precast & MMC: The INR 607B question

### Collective diagnosis

India's precast market at INR 607B in FY26 signals clear market validation. NTPC, NHPC and other major public entities have begun adoption. The technology works. The quality case is made. The question is why mainstream adoption-particularly in government-driven affordable housing and infrastructure-lags so significantly behind the market signal. The answer, consistently, was systemic rather than technical.

A particularly innovative idea that emerged: shared precast infrastructure, modeled on the captive RMC plant model that transformed India's concrete supply chain. Multiple developers sharing a regional precast facility would aggregate demand, reduce capital requirements, improve utilization and make precast economically viable for mid-tier projects. This requires neither new policy nor new technology-only coordination and the right contractual frameworks.



### Opinions & ideas from leaders



*"The biggest barrier to precast is often **mindset** rather than **technology**. The construction industry remains highly focused on reducing upfront material costs, which can make it difficult for solutions with **long-term productivity and quality benefits** to gain acceptance."*

*"The industry should explore the concept of **shared precast infrastructure**. Just as captive ready-mix concrete plants transformed project economics, collaborative precast facilities could **aggregate demand, reduce costs, optimize logistics and improve utilization**."*

*"Singapore accelerated industrialized construction by linking **incentives and land allocation** to the adoption of advanced construction technologies. Similar policy mechanisms could help drive faster adoption of **precast, modular and off-site construction systems** in India."*



### Solutions proposed

- Mandate precast and MMC specification in government contracts above a threshold project value.
- Develop and promote shared precast infrastructure models for Tier-2 and Tier-3 cities.
- Address historical concerns (joint detailing, leakage, durability) through updated engineering standards and demonstration projects.
- Activate quality-based selection procedures already embedded in government procurement frameworks.
- Design future PMAY tranches with precast-compatible building specifications from the outset.

## 3.3 Labor & Skilling: The workforce that does not yet exist at scale

### Collective diagnosis

The CEO Conclave described the skilling situation in terms rarely used in public industry forums: a structural talent emergency. India has only a handful of specialized construction skilling institutions for an industry that will require tens of millions of workers. Current productivity levels are a fraction of international benchmarks. And the workforce required for Construction 4.0—digitally skilled operators, BIM coordinators, robotics technicians—simply does not yet exist in meaningful numbers.



### Opinions & ideas from leaders



*“Countries such as Singapore have demonstrated how structured skilling programs can transform workforce productivity. If India invests in similar upskilling institutions today, the industry can create a pipeline of highly trained artisans and specialists over the next decade.”*

*“The industry has traditionally focused on labor quantity rather than labor productivity. Simply increasing headcount is not enough. The real opportunity lies in improving output per worker through training, mechanization and better workforce management.”*

*“In industrialized construction systems such as precast, productivity can be improved significantly when workers are incentivized based on measurable outputs. Outcome-based incentives linked to production volumes and project delivery can create stronger alignment between workforce performance and business objectives.”*



### Solutions proposed

- Create a network of state-level construction skilling centers with industry co-funding and accreditation from NSDC.
- Reform engineering university curricula to emphasize material science, construction technology and digital tools.
- Introduce Production-Linked Incentive (PLI)-style mechanisms for construction-rewarding measured productivity improvements.
- Develop international benchmarking partnerships (Singapore BCA, EU frameworks) to transfer skilling best practices.
- Reposition construction careers as technology-driven and professionally rewarding through industry-wide awareness campaigns.

## 3.4 Capital & Consolidation: Financing India's triple transition

### Collective diagnosis

The capital conversation revealed a specific and addressable gap. International green financing instruments, including Sustainability-Linked Loans, Sustainability-Linked Bonds, and green bonds, exist and are accessible to Indian firms in principle. The barrier is not the willingness of international capital markets but the readiness of Indian firms to demonstrate verifiable ESG performance. Building that readiness is simultaneously a technology investment, a data infrastructure project and a competitive strategy.



### Opinions & ideas from leaders



*"Sustainability-linked financing instruments have gained traction globally, particularly in dollar-denominated markets. International capital markets are increasingly willing to support sustainability-focused projects when clear performance metrics and reporting frameworks are in place."*

*"The challenge for Indian companies is that the cost of capital continues to be driven largely by domestic lending structures. At present, the opportunity for large-scale green financing remains limited, although this is expected to evolve as sustainability-linked investment frameworks mature."*



### Solutions proposed

- Build national embodied carbon measurement infrastructure as a prerequisite for green financing access.
- Develop domestic SLL and SLB frameworks with lower entry thresholds than international equivalents.
- Create industry-body-led ESG reporting platforms to aggregate and verify sustainability data across the value chain.
- Incentivize industry consolidation where it creates scale, tech capability and ESG reporting readiness.



## Section 4

# The CTO Voice: Technology, innovation & the digital frontier

*The CTO Conclave operated under the theme “Reimagining Concrete 2.0 - When the Site Becomes a System.” Its five topics spanned the full technology spectrum - from deployed AI applications to materials still in research laboratories. What distinguished the CTO conversations was their candor: leaders were as direct about what is not working as about what is.*

## 4.1 AI on site: From pilot purgatory to production

### Collective diagnosis

AI is being deployed. The CTO Conclave documented real production applications: predictive analytics for rotary cyclone choking prevention, AI-driven clinker synthesis optimization, slag characteristic prediction, bid estimation and automated QC. But these deployments are concentrated in large organizations with the data infrastructure to support them. Across the industry, the gap between pilot and production remains vast - and it is a data governance gap, not a technology gap.



### Opinions & ideas from leaders



*"In collaboration with a Sweden-based laboratory, we have utilized AI-powered predictive analytics and historical plant data to anticipate rotary cyclone choking before it occurs. This has helped us proactively manage operations and achieve meaningful reductions in both thermal and electrical energy consumption."*

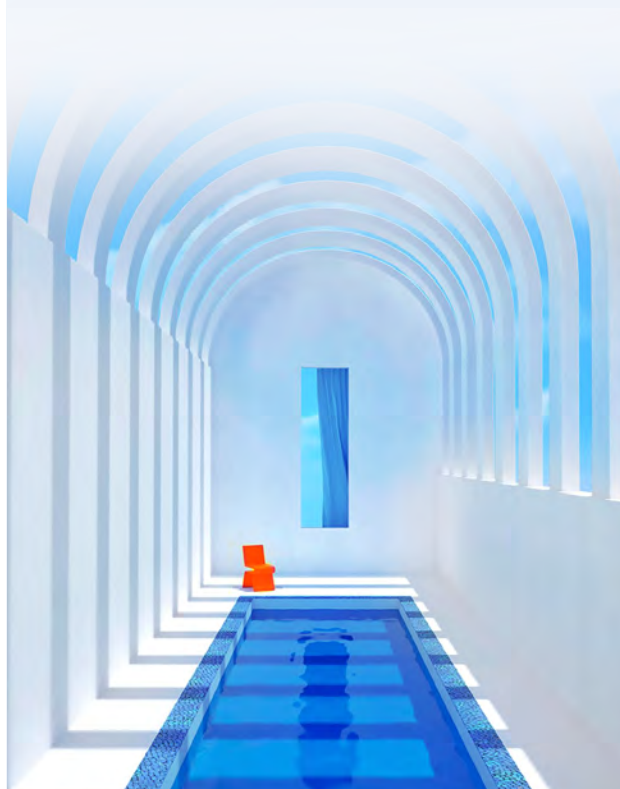
*"Key failure mode: poor data quality and governance frameworks undermine AI ROI before scale is even attempted."*

*"Traceability and transparent decision-making are essential for moving AI from pilot projects to production environments. The ability to understand, verify and, where necessary, modify AI-generated outputs is what ultimately builds user confidence and drives adoption."*



### Solutions proposed

- Prioritize data quality and governance investment over AI tool procurement-clean data is the precondition for AI ROI.
- Develop industry-specific AI governance frameworks: explainability, traceability and liability standards for construction AI.
- Create shared AI platforms for mid-sized firms, trained on construction-specific Indian datasets.
- Establish legal frameworks for IP ownership and liability for AI-generated engineering designs as a matter of urgency.



## 4.2 Digital twins: From BIM to living plant

### Collective diagnosis

Digital twin adoption is real and accelerating in India. Leaders cited plant-level digital twins for cement operations (real-time quality, safety and cost control), construction-phase digital twins for mega-project management, and BIM's evolution into cloud-native Virtual Design & Construction environments. India's estimated 70% digital twin adoption trails Western markets at ~98%-but the trajectory is positive. The quality of underlying data, however, remains the binding constraint.



### Opinions & ideas from leaders



“One of the greatest advantages of digital twin technology is that it allows organizations to build and validate the digital world before the physical world exists. By integrating machine learning, sensors and simulation capabilities, teams can predict outcomes, optimize operations and identify challenges long before execution begins on site.”

“The effectiveness of a digital twin depends entirely on the quality of the underlying data. If the data originating from BIM models, concrete structures and project systems is inaccurate or incomplete, the digital twin will never deliver reliable insights.”

For India's mega-projects-HSR, expressways, metro systems-digital twins are the only realistic way to manage complexity across distributed sites.”



### Solutions proposed

- Fiber-optic sensing and Distributed Temperature Sensing Systems (DTSS) are transforming digital twins from static models to real-time predictive engines.
- Quadruped robots + BIM: autonomous site walkthroughs now update digital twins in real time, flagging safety hazards and material discrepancies.
- Gaming engines are being used to create digital replicas of real-world environments for scenario testing before physical deployment.
- BIM is evolving toward LOD 450-a far richer and more actionable digital representation than current practice.



## 4.3 Robotics, drones & automation: Machines that build

### Collective diagnosis

Out of 1,000 construction sites in India today, perhaps one is using robotics in a meaningful way. This is the industry's honest self-assessment-and it makes the gap between current state and the automation imperative stark. India needs 75M+ construction workers by 2030. Concrete demand could rise from 450M to 1,700M tonnes annually. There is no path to meeting these requirements through traditional labor-intensive methods alone.



### Opinions & ideas from leaders



*"The labor shortage challenge is no longer theoretical. The conversation is no longer about whether robots will enter the workforce, but how quickly industries can deploy them effectively."*

*"Before organizations think about robotization, they must first focus on automation. Standardizing processes, digitizing workflows and creating repeatable systems are essential prerequisites."*

*"The objective of robotics is not to replace people but to eliminate repetitive and mundane work. Initiatives such as L&T's Project Kohinoor demonstrate how automation can improve productivity."*



### Key barriers identified

- High sensor costs: Every AI model, digital twin and automation platform depends on sensors, and cost sensitivity in concrete's thin-margin business limits deployment.
- Psychological resistance: The perception that robots threaten jobs-even when organizations create new roles around automation-must be actively managed.
- Structural site conditions: India's fragmented, unstructured construction sites are harder to retrofit with robotics than greenfield deployments.
- Sequencing: Automation must precede robotization-standardized, digitized processes are prerequisites.



## 4.4 3D concrete printing: From proof of concept to housing colony

### Collective diagnosis

3D concrete printing has moved beyond science fiction in India-post offices, military structures and housing pilots have been completed. One conclave participant reported operating three commercial 3DCP factories producing bunkers, hospitality projects and architectural structures. The debate in 2026 is not about whether 3DCP works-it is about economics, mix design standards, regulatory frameworks and the optimal hybrid positioning of 3DCP alongside precast.



### Opinions & ideas from leaders



*“Our organization has already moved beyond pilot projects and into commercial deployment. We currently operate three factories manufacturing specialized 3D-printed structures. Many of these designs would be extremely difficult, if not impossible, to execute efficiently through conventional precast methods.”*

*“The economics of 3D printing depend on getting three factors right: the material mix, the machine and the application. When these elements are optimized, 3D printing can become highly cost-efficient.”*

*“Nearly 95% of buildings do not fall into the high-rise category. For low-rise structures, 3D printing has the potential to become a highly practical and efficient construction solution.”*



### Key technology signals

- Gantry-based systems are emerging as the dominant architecture for construction-scale printing in India.
- The critical gap: no standardized mix designs, reinforcement strategies, quality standards or regulatory frameworks exist in India.
- PMAY-affordable housing at national scale-is the highest-value potential application.
- Circular economy intersection: 3DCP using GGBS, fly ash and C&D waste-derived materials simultaneously reduce carbon and cost.



## 4.5 Circular economy, material innovation & the commercialization chasm

### Collective diagnosis

The circular economy and material innovation discussions converged on a single conclusion: India has an abundance of raw innovation and an abundance of untapped waste resources. What it lacks is the pathway from laboratory to laborer—the standardization, policy incentive, procurement preference and ecosystem readiness that allows innovation to cross the commercialization chasm.



### Opinions & ideas from leaders



*“The industry often focuses on developing advanced materials but overlooks execution fundamentals. Curing remains one of the most critical aspects of concrete performance, yet it is frequently not carried out as effectively as it should be on-site.”*

*“Demand for GGBS and slag-based materials continues to grow as the industry seeks lower-carbon alternatives and supplementary cementitious materials that improve both sustainability and performance.”*



Specific innovations identified as “near-laborer” with the right policy support: PCE superplasticizer next generations; waterproofing nanotechnology; bacterial self-healing concrete systems (CSIR-SERC); green UHPC; bio-based admixtures; phase change materials for passive cooling (15–30% HVAC load reduction). Each has commercial prototypes. None has a clear BIS standard or CPWD specification pathway.



### Key achievements

- Blast furnace slag successfully commercialized as a structural construction material, demonstrating that industrial by-products can cross the laboratory-to-site gap with the right ecosystem support.
- GGBS and slag-based supplementary cementitious materials are now seeing strong demand growth across the sector, backed by performance data and growing procurement preference.
- India is home to three commercial 3D concrete printing factories producing bunkers, hospitality, and architectural structures at scale, beyond proof-of-concept.
- CSIR-SERC Chennai is actively developing self-healing geopolymer concrete systems. India has indigenous R&D capability in next-generation materials, not just adoption of imported innovation.
- IS 383 framework established for recycled aggregate concrete; the regulatory foundation exists; the execution ecosystem now needs to close the gap.
- Phase change materials (PCMs) for passive cooling have been proven commercially in global markets, delivering 15–30% HVAC load reduction, and are approaching Indian market and specification readiness.
- India's estimated 19B tonnes of LD slag have been identified and documented as the raw material base for circular economy transformation at an unprecedented scale, exist, and are waiting to be unlocked.



## Section 5

# Policy recommendations: The industry's unified ask

*The following twelve recommendations represent the consolidated policy asks of India's concrete industry leadership - drawn from the combined outputs of the CEO and CTO Conclaves. They are organised across five strategic pillars and directed at specific government counterparts. They range from immediate implementation requirements to 3–5-year structural interventions.*

## Pillar 1

### Carbon transition & green finance

| # | Pillar & ask                                              | Rationale from Conclave                                                                                                                          | Priority                                                                                                                                    | Directed To |
|---|-----------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| 1 | <b>L1-Carbon procurement</b>                              | Integrate carbon emission scoring into government infrastructure project evaluation alongside L1 cost. Begin with contracts above INR 100 crore. | India's carbon goals are unachievable without demand-side pull. Procurement is the fastest lever for scaling low-carbon materials.          | ●           |
| 2 | <b>Green public procurement for cement &amp; concrete</b> | Specify low-carbon cement and concrete as a procurement preference for central government infrastructure and housing projects.                   | Green cement and LC3 blends are available today. Procurement preference creates demand at scale without mandating single technologies.      | ●           |
| 3 | <b>Carbon credit trading scheme clarity</b>               | Publish clear timelines, penalty structures and credit pricing for the cement sector under the GHG Emission Intensity Target framework.          | 186 cement facilities are now covered. Investment decisions in decarbonization require regulatory certainty on credit values and penalties. | ●           |
| 4 | <b>Embodied carbon measurement standard</b>               | Develop a national embodied carbon measurement and reporting framework for construction materials, aligned with international standards.         | Green financing access requires internationally credible ESG data. This is the foundational infrastructure for all green capital flows.     | ●           |

● 1-3 Years ● Immediate

How to read this table: Each recommendation is tagged with a priority (immediate / 1-3 years) and addressed to a specific ministry or body. 'Immediate' means the policy framework, not necessarily execution, should be actioned within 12 months.

## Pillar 2

### Procurement reform & standards acceleration



| # | Pillar & ask                                               | Rationale from Conclave                                                                                                                                               | Priority                                                                                                                                                                         | Directed To |
|---|------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| 5 | <b>Mandatory precast &amp; MMC in government contracts</b> | Mandate precast or MMC specifications in government construction contracts above a defined threshold, with phased implementation starting with PMAY and NIP projects. | India's precast market is at INR 607B with demonstrated capability. Policy mandate is the proven fastest adoption accelerator (Singapore model).                                 | ●           |
| 6 | <b>BIS fast-track standards for innovation materials</b>   | Establish a dedicated BIS fast-track pathway for innovation materials: UHPC, self-healing concrete, PCM concrete, 3D-printed concrete and green admixtures.           | Research exists. Prototypes exist. Standards do not. Without BIS standards, innovative materials cannot be specified on government projects and remain niche.                    | ●           |
| 7 | <b>Performance-based procurement framework</b>             | Reform CPWD and MoRTH specifications to enable performance-based procurement (outcome specifications) across construction materials and methods.                      | Prescriptive specifications prevent hybrid technology approaches and technology-agnostic innovation. Performance outcomes should define the ask; industry should define the how. | ●           |

● 1-3 Years ● Immediate

How to read this table: Each recommendation is tagged with a priority (immediate / 1-3 years) and addressed to a specific ministry or body. 'Immediate' means the policy framework, not necessarily execution, should be actioned within 12 months.

## Pillar 3

### Skilling & workforce transformation



| # | Pillar & ask                                              | Rationale from Conclave                                                                                                                                                                        | Priority                                                                                                                                                                        | Directed To |
|---|-----------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| 8 | <b>National construction skilling mission</b>             | Launch a National Construction Skilling Mission with industry co-funding, state-level implementation, NSDC accreditation and mandatory industry participation above a project scale threshold. | Effective skilled labor deficit far exceeds headline estimates. India has only a handful of specialized construction skilling institutions for a multi-trillion-rupee industry. | ●           |
| 9 | <b>PLI-style productivity incentives for construction</b> | Design a Production-Linked Incentive equivalent for construction-rewarding measurable labor productivity improvements and technology adoption on infrastructure projects.                      | Outcome-based incentives in industrialized construction demonstrably improve performance. PLI mechanisms have proven effectiveness in adjacent sectors.                         | ●           |

● 1-3 Years ● Immediate

How to read this table: Each recommendation is tagged with a priority (immediate / 1-3 years) and addressed to a specific ministry or body. 'Immediate' means the policy framework, not necessarily execution, should be actioned within 12 months.

## Pillar 4

### Technology enablement



| #  | Pillar & ask                                          | Rationale from Conclave                                                                                                                                                   | Priority                                                                                                                                                                                         | Directed To |
|----|-------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| 10 | <b>AI governance framework for construction</b>       | Establish a regulatory framework for AI in construction: covering explainability requirements, legal liability for AI-generated designs and data ownership standards.     | Legal liability for AI-generated designs is an unresolved exposure on projects already deployed. Without governance frameworks, AI adoption in safety-critical applications will remain limited. | ●           |
| 11 | <b>Sensor &amp; automation cost reduction program</b> | Create policy incentives (import duty relief, R&D credits) specifically targeting sensor technology costs for construction automation, digital twins and AI applications. | High sensor costs are the primary barrier to AI, digital twin and robotics deployment at scale in thin-margin RMC and concrete businesses.                                                       | ●           |

● 1-3 Years ● Immediate

*How to read this table: Each recommendation is tagged with a priority (immediate / 1-3 years) and addressed to a specific ministry or body. 'Immediate' means the policy framework, not necessarily execution, should be actioned within 12 months.*

## Pillar 5

### Circular economy & waste infrastructure

| #  | Pillar & ask                                 | Rationale from Conclave                                                                                                                                                                                  | Priority                                                                                                                                                           | Directed To                                                                          |
|----|----------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 12 | <b>C&amp;D waste infrastructure scale-up</b> | Scale operational C&D waste recycling infrastructure from ~20 to a minimum of 200 plants nationally. Mandate source-segregation of C&D waste. Introduce defined C&D content requirements for RMC plants. | India generates 150M tonnes of C&D waste annually. Only ~20 recycling plants exist. The Supreme Court has directed action. Execution gap is critical and widening. |  |

 1-3 Years  Immediate

*How to read this table: Each recommendation is tagged with a priority (immediate / 1-3 years) and addressed to a specific ministry or body. 'Immediate' means the policy framework, not necessarily execution, should be actioned within 12 months.*



## **Section 6**

A call to action:  
Building concrete India 2.0

India's concrete industry is not asking for permission to grow. It is already growing at a pace and scale that will shape the physical character of the nation for the next century. What it is asking for is alignment: between the ambitions of those who build, and the frameworks created by those who govern.

The WOC 2026 CEO-CTO Conclave demonstrated, with unusual clarity, that business leaders and technology leaders in this sector share a common diagnosis, a common direction and a common frustration. The diagnosis is that India's concrete industry stands at an inflection point where the decisions taken in the next three to five years will determine whether it becomes a global leader in sustainable, technology-enabled construction or remains constrained by the systemic barriers-procurement, standards, skilling, data infrastructure-that have held adoption back for a decade.

The direction is clear: industrialized construction at scale; decarbonization from plant gate to finished asset; digital infrastructure as a competitive weapon; a circular economy that processes waste into value; and a workforce development investment commensurate with the scale of the opportunity.

The frustration is equally clear: innovation leads policy. Standards lag research by years. Procurement frameworks actively discourage the solutions the nation needs. Legal frameworks for new technologies do not exist. And the data infrastructure required for green financing, AI governance and carbon accounting is underdeveloped across most of the industry.

## The industry's commitment

India's concrete industry commits to investing in decarbonization technology and carbon accounting infrastructure; accelerating adoption of digitally enabled construction methods; building shared skilling ecosystems with government co-funding; developing ESG reporting capability for green financing access; and participating actively in standards development for next-generation materials and technologies. In return, the industry asks government to provide: the regulatory clarity, procurement reform, standards acceleration and infrastructure investment that only government can provide.

## Five immediate priorities for the next 12 months

|    |                                                                                                                                                                                                                                                                                                                         |                                                                                       |
|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 01 | <b>Activate L1-carbon procurement evaluation</b> <ul style="list-style-type: none"> <li>Pilot in five central government infrastructure projects above INR 100 crore. Publish evaluation methodology within six months.</li> </ul>                                                                                      |  |
| 02 | <b>Publish carbon credit scheme clarity for cement</b> <ul style="list-style-type: none"> <li>Release timelines, penalty structures and credit pricing for the 186 cement facilities covered under the GHG Emission Intensity Target Rules.</li> </ul>                                                                  |  |
| 03 | <b>Launch the national construction skilling mission</b> <ul style="list-style-type: none"> <li>Announce the mission with industry co-funding commitments, state government partners and NSDC accreditation framework.</li> </ul>                                                                                       |  |
| 04 | <b>Commission BIS fast-track standards working group</b> <ul style="list-style-type: none"> <li>Establish a dedicated working group for UHPC, self-healing concrete, 3D-printed concrete and PCM concrete standards, with an 18-month delivery target.</li> </ul>                                                       |  |
| 05 | <b>Direct states to scale C&amp;D recycling infrastructure</b> <ul style="list-style-type: none"> <li>Issue a national directive to states to scale C&amp;D waste recycling capacity, with a minimum of 10 plants per major state and source-segregation mandates for demolition projects above a threshold.</li> </ul> |  |

## The measure of progress

The industry proposes the following as measurable indicators of policy progress to be reviewed at the WOC 2027 Conclave:

| Indicator                                | 2027 Target (from 2026 baseline)               |
|------------------------------------------|------------------------------------------------|
| Government contracts with carbon scoring | 5 pilot contracts announced                    |
| Operational C&D recycling plants         | 50+ (from ~20)                                 |
| National construction skilling centers   | Mission launched, 10 pilot centers operational |
| BIS standards for innovation materials   | At least 2 fast-tracked standards published    |
| AI governance framework                  | Consultation paper released                    |
| Precast market size                      | INR 680B+ (from INR 607.0B)                    |
| Renewable energy share in cement         | 5%+ (from 3%)                                  |

***India will build its future in concrete. The only question is whether it will build it sustainably, efficiently and competitively-or not. The WOC 2026 Conclave was the industry's answer: it will, if government will meet it halfway.***



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# About us

## One platform. Every intelligence need.

1Lattice offers a comprehensive suite of intelligence and advisory solutions that help business leaders understand consumers and markets, evaluate opportunities, navigate complex industries, and make better strategic decisions with speed and confidence.

### Intelligence offerings

|                  |                                      |                                                                                                          |
|------------------|--------------------------------------|----------------------------------------------------------------------------------------------------------|
| <b>1Sense</b>    | <i>Understand consumers deeply</i>   | <i>Understand what consumers value, experience, choose, and change across categories.</i>                |
| <b>1Insights</b> | <i>Understand markets better</i>     | <i>Turn fragmented market information into a clearer view of industries and opportunities.</i>           |
| <b>1Alpha</b>    | <i>Go public successfully</i>        | <i>Understand IPOs, equity markets, and companies through focused market and transaction research.</i>   |
| <b>1Expert</b>   | <i>On demand expert intelligence</i> | <i>Bring expert perspectives into decisions where market knowledge alone is not enough.</i>              |
| <b>1Deals</b>    | <i>Invest with conviction</i>        | <i>Evaluate companies, markets, and transactions with relevant commercial &amp; competitive context.</i> |

### Vertical platforms - Multi-use-case platform access

|                  |                                             |                                                                                                       |
|------------------|---------------------------------------------|-------------------------------------------------------------------------------------------------------|
| <b>zoom1n</b>    | <i>Micro-market intelligence for growth</i> | <i>Understand local markets, catchments, and expansion potential at a granular level.</i>             |
| <b>1Frontier</b> | <i>Navigate the industries</i>              | <i>Track emerging sectors, competitive shifts, and opportunities across evolving industries.</i>      |
| <b>MediQ</b>     | <i>Healthcare intelligence</i>              | <i>Understand healthcare markets through disease, therapy, category, and commercial intelligence.</i> |

|                   |                                              |                                                                                                                  |
|-------------------|----------------------------------------------|------------------------------------------------------------------------------------------------------------------|
| <b>1Knowledge</b> | <i>One platform. Unlimited intelligence.</i> | <i>Bring research, institutional knowledge, and ongoing intelligence together in one structured environment.</i> |
|-------------------|----------------------------------------------|------------------------------------------------------------------------------------------------------------------|

# About World of Concrete

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The WoC India is the leading and most influential concrete show in India. It provides an excellent platform for industry players, professionals, suppliers and buyers from all over the country to come together and discuss the latest advancements and innovations in the construction industry.

The show features exhibitors showcasing their latest products, technologies and services in the construction sector. It also features interactive sessions and workshops that enable visitors to gain in-depth knowledge about the latest trends and practices in the industry. Furthermore, the show provides a great opportunity for networking and business development. This is a must-attend event for anyone looking to stay abreast of the latest developments in the construction field.



# Thank you!

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